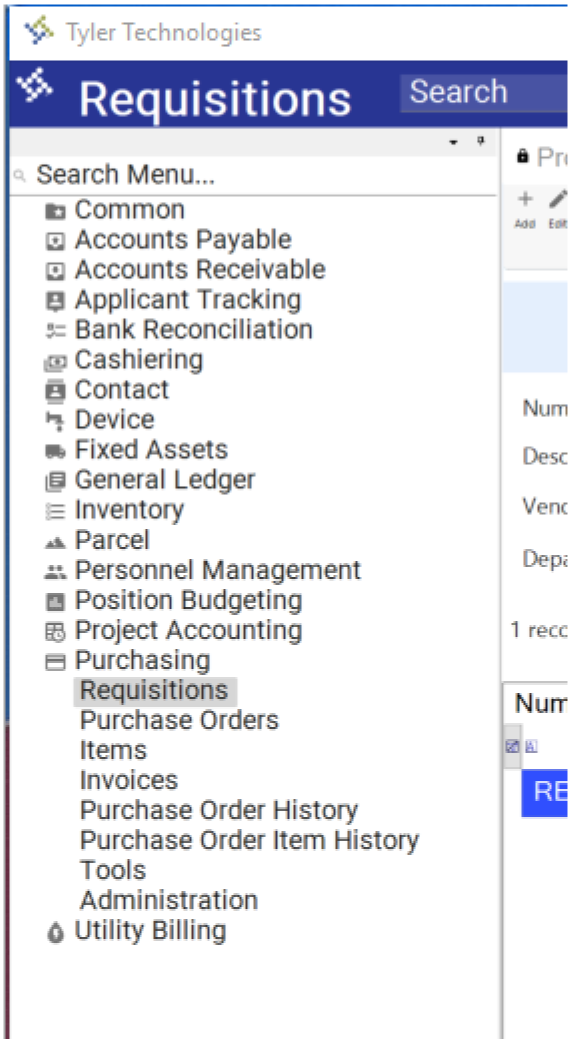
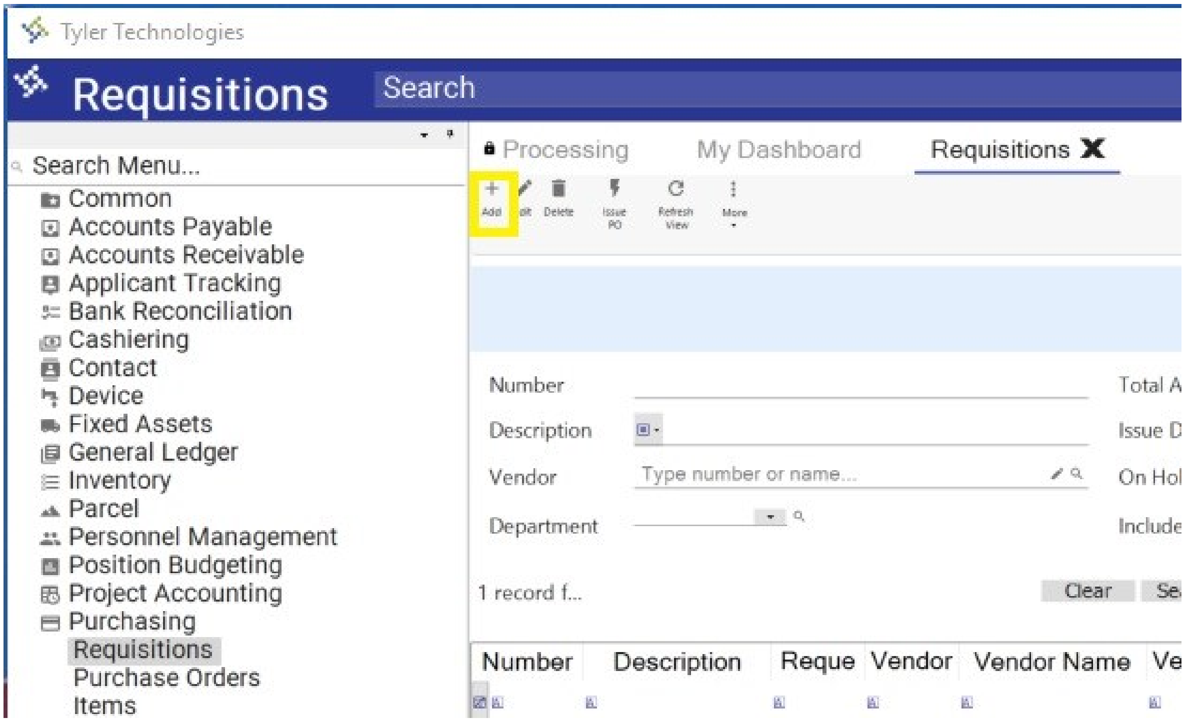
Incode 10: Creating Purchase Order Requisition

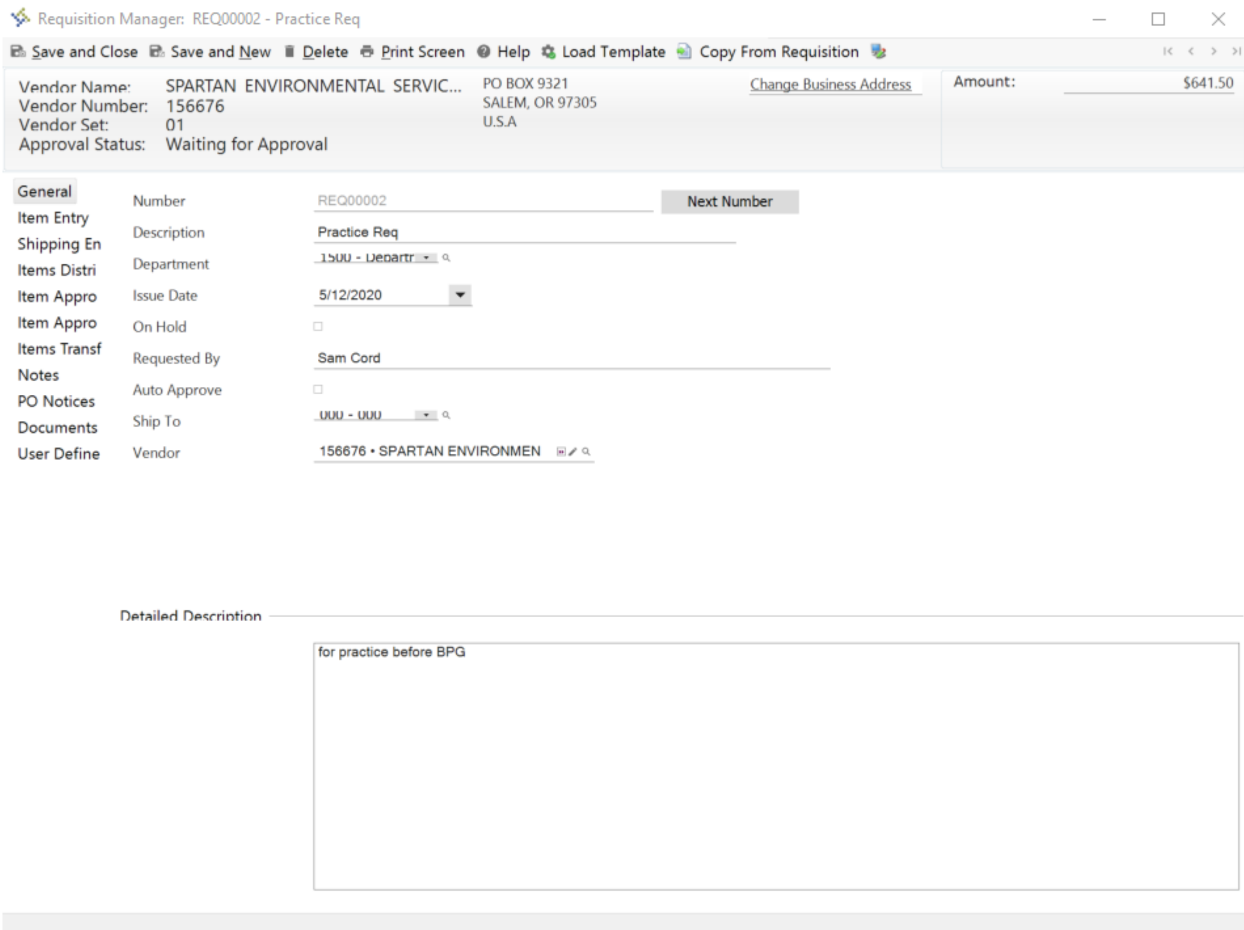
1. Go to: Purchasing/**Requisitions**



2. Select "**Add**"


Tyler Technologies
Requisitions
Search
Search Menu...
Common
Accounts Payable
Accounts Receivable
Applicant Tracking
Bank Reconciliation
Cashiering
Contact
Device
Fixed Assets
General Ledger
Inventory
Parcel
Personnel Management
Position Budgeting
Project Accounting
Purchasing
Requisitions
Purchase Orders
Items
Processing
My Dashboard
Requisitions
Add
Delete
Issue PO
Refresh View
More
Number
Description
Vendor
Type number or name...
Department
1 record f...
Clear
Number
Description
Reque
Vendor
Vendor Name

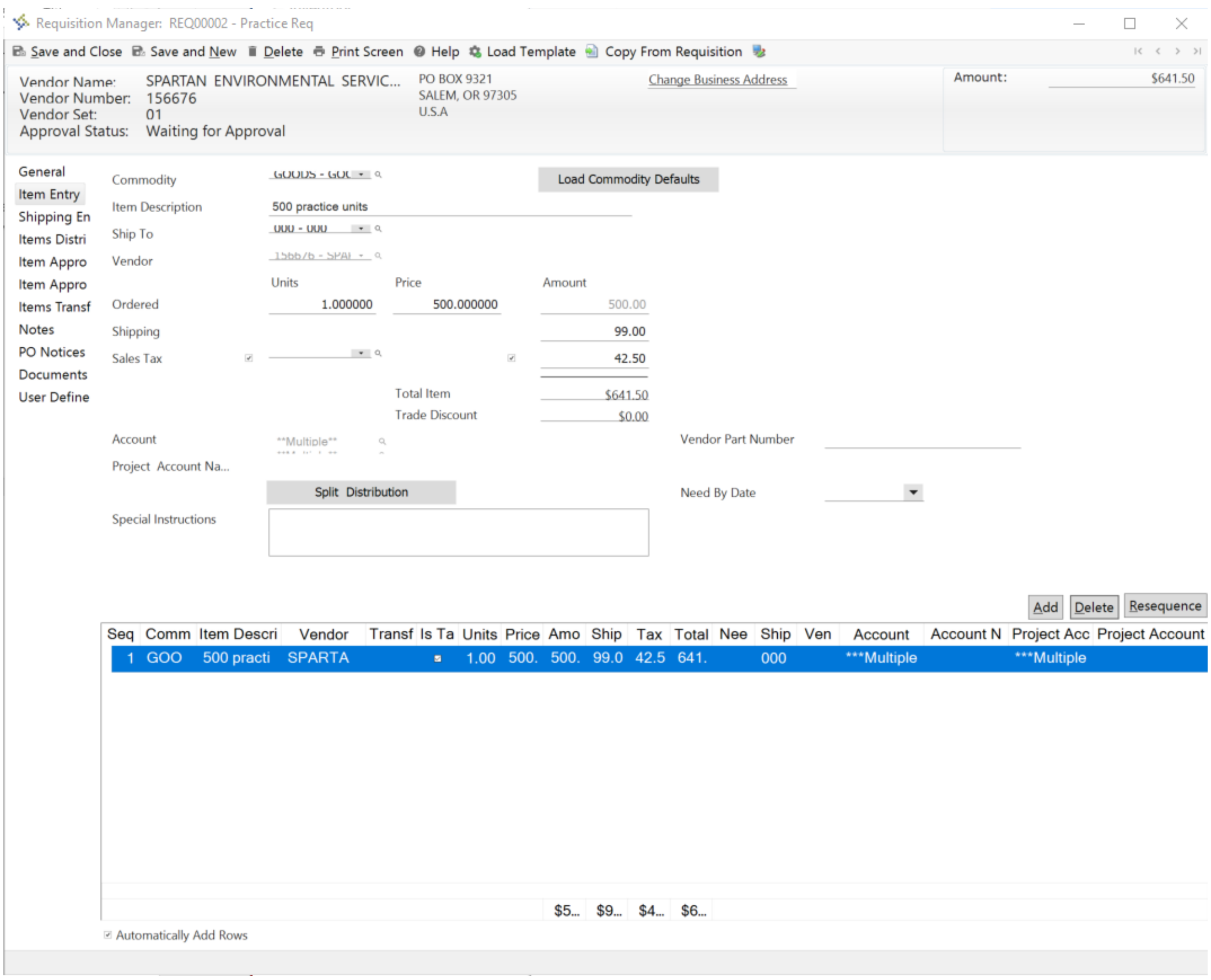
3. Input General Info:



- Enter Packet **Number**: Select "Next Number" button if new PO, otherwise enter in numbers and letters as appropriate for POCOs
    - If you are creating a POCO (Purchase Order Change Order), please use the subsequent letter beginning with an uppercase A (If your PO# is 2141501, your first POCO would be 2141501A. The following POCO would be 2141501B).
- Enter **Description** of PO: If one-time purchase order enter what purchase order is for. Example: Repair Parts. If entering an open purchase order please put FY XX-XX OPEN POCO DEPARTMENT. Example: FY 19-20 OPEN POCO WASTEWATER COLLECTION.
- Select your **Department**: You can find your department by selecting the magnifying glass icon to the right of the selection line.
- **Issue Date** will automatically display the current date, please change to the beginning of the fiscal year for purchase order to be assigned.
- **Requested By** will automatically have the requestor's name. No action needed.
- On the **Ship To** line, always select 000-000.

- **Vendor:** Enter the vendor number or select the magnifying glass to search for a vendor. If you cannot find a vendor, please contact Gina Roden, ext. 4159, or Jennifer Reeves, ext. 4112.
- **Detailed Description:** This section is *Compulsory* and *vital* for any POs regarding government funded or large, ongoing projects. This is where to enter required information such as Bid information and authorized signers

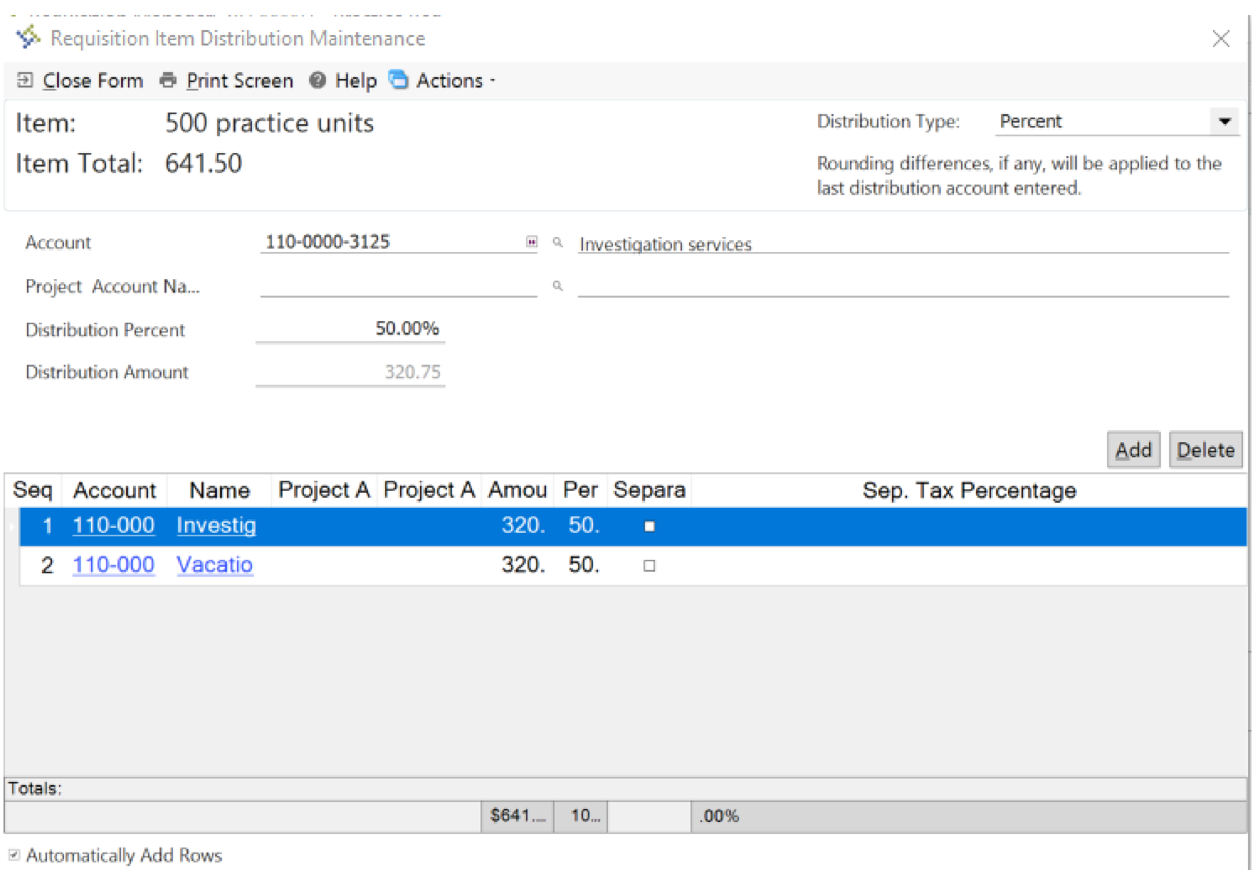
4. Input Item Entry:



- Select the type **Commodity** always select N/A
- Enter **Item Description.**
- On the **Ship To** line, always select 000-000.
- The **Vendor** should be the same as the general tab.
- Enter the **Ordered Amount** this should be the total taxable amount of invoice
- Enter the **Shipping Amount**.
- Select **Sales Tax** check the box to the right of the sales tax line and manually input the total sales tax in the amount column.

- Enter GL number in the **Account** cell. You can search for an account number by selecting the magnifying glass to the right of the account cell.
- Enter a **Project Number**, if applicable. You can search for project number by selecting the magnifying glass to the right of the account cell.
- *If the PO needs to be split between multiple accounts or other non-taxed fees needed to be added,* select the **Split Distribution** button (go to step 5)**.**
- Select **Add** on the bottom right to add other goods or services to the PO and repeat step 4 to complete these new items, if applicable.
- Select **Save and Close**.

5. Input Split Distribution (If Applicable):



- Select the **Distribution Type**: select “Percent” to allocate a percentage of the PO to an account or “Amount” to manually enter dollar amounts to different accounts.
- Select an **Account**. You can search for an account using the magnifying glass.
- Select a **Project Number**. You can search for a project number using the magnifying glass.

- Enter the **Distribution Percent** or **Distribution Amount**.
- Select **Add** and repeat step 5 for the next account you wish to be allocated.
- Continue to add or delete lines as needed until the full amount of the PO has been allocated to the desired accounts.
- Select **Close Form**.
- Confirm that step 4 is also complete, then hit **Save and Close** (Pictured in Step 4)**.**